

1 Rosa Linda Larssen (CONS/PE)

Case No. 0321261

Atty Amador, Catherine A. (for Petitioner Sylvia JP Gonzalez)

(1) Thirteenth Account and Report of Successor Co-Conservator and (2) Petition
for Allowance of Fees to Conservator

		NEEDS/PROBLEMS/COMMENTS: CONTINUED TO 1/20/2015 Per attorney request
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		Reviewed by: LEG
		Reviewed on: 12/17/14
		Updates:
		Recommendation:
		File 1 - Larssen

Petition for Appointment of Successor Probate Conservator of the Person and Estate

Age: 72 years		BARBARA STALIS , sister/conservator, is petitioner and requests KAREN METZLER , as successor Conservator without bond.	NEEDS/PROBLEMS/COMMENTS: Court Investigator advised rights on 12/3/14. Voting Rights Affected. Need Minute Order. Note: Accountings were dispensed with in 2001. At that time the conservatee was residing in her own home. The conservatee has been living in assisted living since 2010 with no plans for her to return to independent living. The court may require information on the status of the conservatee's real property. Is someone living in the home? Is it being rented? Is it generating income? Are the taxes being paid? Is it insured?
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<input checked="" type="checkbox"/>	Notice of Hrg	Estate value: Personal property - \$ 107.00 Social Security - \$15,600.00 Real property - \$80,000.00 Voting Rights Affected. Petitioner states the Conservatee has been under a conservatorship of her person since 9/1995. She resides in a care facility and she will not be returning to her home. The Conservatee is unable to manage her estate. All of her income, except \$30 goes to the living facility where she resides. Current conservator/Petitioner Barbara Stalis intends to resign upon the appointment of a successor Conservator as she no longer desires to remain as conservator. Court Investigator Charlotte Bien's Report filed on 12/8/14.	
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			Reviewed by: KT Reviewed on: 12/18/14 Updates: Recommendation: File 2 - Taylor

Atty
Atty

Wishon, A. Emory (for Executor Diane Esparza)

Roberts, Gregory J. (for Objector Ray A. Esparza)

Amended First and Final Account and Report of the Status of Administration and
Petition for Settlement Thereof; For Allowance of Statutory Attorneys'Compensation and for Final Distribution (Probate Code 1060, et seq., 9611, 11640,
10800, 10810, 10900 and 12201)

DOD: 3-2-13		<p>DIANE ESPARZA, Executor with Limited IAEA without bond, is Petitioner.</p> <p>Account period: 3-2-13 through 6-30-14 Accounting: \$175,094.62 Beginning POH: \$164,061.64 Ending POH: \$175,105.87 (\$54,505.87 cash plus real property, personal property, and rent due from Executor Diane Esparza of \$10,400.00)</p> <p>Executor (Statutory): \$6,252.84 Attorney(Statutory): \$6,252.84</p> <p>Petitioner states she advanced estate expenses totaling \$13,868.21 during this account period. Petitioner also resided in the home; therefore, she owes rent of \$650/month from 3-2-13 through 6-30-14 totaling \$10,400.00. Therefore, the balance due Petitioner for unreimbursed expenses is \$3,468.21.</p> <p>Petitioner requests distribution pursuant to Decedent's will: Diane Esparza and Ray A. Esparza, as trustees of the Ray P. and Virgie Esparza Trust dated 11-1-96: \$159,059.08</p> <p>Objection by Ray A. Esparza filed 9-23-14 states Objector has concerns and believes not all of the assets are accounted for and that many of the expenses are inappropriate.</p> <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> In response to these Examiner Notes, the Supplemental Declaration filed 11-26-14 states notice was given to the Franchise Tax Board pursuant to Probate Code §9202(c); however, it does not state when. The Court may require clarification as to the date to ensure appropriate notice. Need clarification as to how the Costco membership purchased 7-19-13 for \$55.00 is an estate expense. There do not appear to be any estate purchases from Costco. The Court may deduct this amount from Petitioner's request for reimbursement. (Supplemental Declaration states it was intended to benefit the estate.) Petitioner includes the \$10,400.00 that she owes the estate for rent as a "receipt" in calculating statutory compensation for herself and her attorney. However, this amount was not received by the estate during this account period. The Court may require authority to include this amount as a "receipt." If not approved, Examiner calculates statutory compensation at \$5,940.84. (Note: This affects the distribution amount as well.) (Note: Supplemental Declaration states this is revenue that should be included for fee calculation; however, no authority is provided.) 	
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		<p>Reviewed by: skc</p> <p>Reviewed on: 12-19-14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 3 - Esparza</p>		

Page 2

Objector states the following assets were not included on Schedule Entitled Property On Hand March 2, 2013:

1. Money in the Murphy Bank Account.
2. Decedent's Ford Explorer.
3. Jewelry.

Objector states the following assets should not have been included on the Schedule Entitled Property On Hand March 2, 2013:

1. Chase Account xx371. This account named Petitioner and Objector as beneficiaries and should have been distributed directly to them. If distributed pursuant to the will and the trust, there are additional beneficiaries who are not designated as beneficiaries of this account.

Objector objects to the rent of \$650.00 and states the rent should be at least \$1,000.00/month. Objector states the total receipts are less than what they should be. They should be \$5,560.00 higher for the 16 months and \$1,000 for each month beyond the 16 month that Petitioner remains in the residence.

Objector objects to the following specific expenses:

1. \$49 bimonthly payment for Howard's Pest Control. Petitioner was residing in the residence and received the benefit of this service. It did not benefit the estate.
2. \$160 monthly White Oak Lawn Service appears to be very expensive and was for the benefit of Petitioner and not the estate.
3. Multiple charges to JJ's Handy Man Service. These expenses were also incurred by Petitioner to live in the residence and were not for the benefit of the estate. They are also excessive.
4. \$1,367.67 for ADT Alarm Installation. The residence already had an alarm. A new alarm system did not benefit the estate.
5. \$55 Costco membership – Why did the estate pay for a Costco membership?
6. Vern's Plumbing – multiple charges.
7. \$864.00 for Wells Fargo Credit Card – Objector believes this includes charges made by Petitioner after the decedent's death including a car rental by Petitioner prior to her taking the Decedent's Ford Explorer.
8. Fresno Ag – various charges for light fixtures, faucets and yard equipment. If equipment was purchased, it should be part of the estate. Why is the estate purchasing new fixtures and equipment?
9. Dumpster charges – Petitioner rented a dumpster to throw away Decedent's papers and belongings before Objector could look at them. This was not necessary.

Objector states there are many expenses that Objector questions and he would like to see receipts and invoices to assure that they are proper estate expenses.

Objector hired an attorney to file the objection to the initial petition to probate the estate and now to this petition. Petitioner's attorney fees are paid by the estate. Objector requests that his attorney's fees also be paid by the estate, or that he be reimbursed by the estate for attorney's fees and costs incurred.

SEE ADDITIONAL PAGES

On 11-20-14, Petitioner Diane Esparza filed Response to Objection of Ray Esparza. Ms. Esparza states:

1. The Murphy Bank account with approx. \$13,000.00 at the decedent's death was in the decedent's name, but was many times told to Petitioner that it would belong to Petitioner at the decedent's death based on the numerous improvements to the home made over the years by Petitioner.
2. The Ford Explorer was purchased by the decedent and her husband as at the time, Petitioner had no credit history. However, the down payment, all loan payments, and all operating and maintenance expenses were made by Petitioner, and the vehicle was almost never driven by anyone other than Petitioner. The vehicle was at all times the property of Petitioner held for the above accommodation reasons in the name of the decedent.
3. Petitioner found no jewelry to add to the inventory. For months after the decedent's death, Ray Esparza and his guests came into the house at will.
4. Re Chase Account: If documentation can be found directing this asset to Petitioner and Objector as beneficiaries, Petitioner will gladly respond. Petitioner cannot find any.
5. Re Rent: Petitioner states she does live in the house, a 2 bedroom/1 bath 800 sq. ft. house built in 1953 by Petitioner's parents. The house is in poor condition. The house next door, a 2/2 in good condition and maintained by a property manager, rents for \$775/month. Nearby apartments in significantly better condition rent for \$625-750/month.
6. Pest service is typically a landlord expense to protect the long run value of the home. It absolutely benefits the estate.
7. Yard: \$40/week is very inexpensive for yard service and is typically a landlord expense.
8. Handyman services: There is much deferred maintenance in the 1953 home and it needs substantial attention to be habitable.
9. The existing alarm system did not operate and was not repairable. The new system is adequate to protect the home.
10. Petitioner agrees that the Costco membership should be deleted. It was purchased to lower the cost of items the home needs (new toilet, etc.), but those purchases did not fit with the maintenance only occupancy so they were not made.
11. Plumbing – same as above
12. Wells Fargo Credit Card: The decedent rented cars from time to time. The petitioner did not and does not rent cars. All credit card charges were solely by the decedent.
13. Fresno Ag – same as above.
14. Dumpster charges – The house had much accumulated junk. The removal of junk made the home habitable. Objector used the dumpster to discard items of his as well.

Petitioner states she has all checks and most receipts. This accounting was first distributed to Objector in August 2014 and no objection was made until the filing of the objection in September 2014. Petitioner states she has been truthful with the Court. There is discord in the family which has greatly increased the burden of this role, but Petitioner has performed her executrix duties responsibly. Objector has greatly increased the burden on Petitioner. Petitioner has not requested extraordinary fees for her services and objects to diminishing the estate to compensate Objector's attorney.

Petitioner also filed a declaration that appears to address examiner notes from June 2014 in connection with the initial petition for probate.

		LINDA CROUCH , daughter and Conservator of the Person and Estate, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. The pleadings do not give enough information to determine what the accurate reduction in bond should be. What were the proceeds of the sale of the conservatee's residence? Are there any other assets that have not been disclosed? Bond that is presently posted is \$113,213.60 Estimated proceeds from the sale of the property \$74,200.00 RBC Investment Services \$8,927.19 Estimated Annual Income \$14,220.00 Based on the above information the estimated amount of reduction in bond should be \$6,131.69 for a total bond of \$107,081.91.
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		<p>Petitioner states: on 07/03/2014, petitioner filed a bond in the amount of \$45,000.00 as required by Order of the Court dated 06/04/2014.</p> <p>The existing amount of bond is excessive because the personal property amount entered on the Petition for Appointment of Conservator of Person and Estate filed 03/17/2014, was an estimate by the Conservator. Counsel was unaware at that time that the investment with RBC Investment Services Group was joint tenancy account standing in the name of the Conservatee and her daughter, Linda Crouch, Conservator, herein. A Supplemental Inventory and Appraisal was filed on 10/22/2014, showing the amount in that investment belonging to the conservatorship to be \$8,927.19.</p> <p>The Conservatee will not suffer harm as a result of the reduction of the bond, because the sale of the Conservatee's one-half interest in her personal residence has been confirmed, and an additional bond in the amount of \$68,213.60, pursuant to the Court's order filed 10/23/2014, has been obtained, sent for the Conservator's signature, and will be filed. Petitioner desires that liability on the bond for future transactions be reduced to \$10,027.19.</p> <p>Wherefore, Petitioner requests that the Court order the liability of the existing bond to be reduced to \$10,027.19 and for such other relief that the Court considers proper.</p>	
Reviewed by: LV			
Reviewed on: 12/19/2014			
Updates:			
Recommendation:			
File 4 - Welton			

Petition for Instructions

		LORRAINE RENEE ALVAREZ , Maternal Grandmother and Guardian of the Person and Estate with bond of \$7,629.60, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Petitioner states the bond of \$7,629.60 represented the approximate annual value of the minor's social security benefits. Petitioner has discovered that the minor is entitled to additional benefits from CalSTRS, including a monthly benefit of \$1,500.00 and Defined Benefit Supplement of \$10,533.90, as well as a one-time death benefit of \$6,163.00. The minor is also the beneficiary of a separate life insurance policy from Texas Life in the amount of \$2,500.00.	<ol style="list-style-type: none"> 1. Petitioner's proposed bond calculation does not include cost of recovery as required by Probate Code §2320(c)(4) and Cal. Rule of Court 7.207. Examiner calculates bond should be increased by \$19,800.00 for a total bond of \$27,419.60. 2. The Court may require clarification regarding the \$9,561.73 owed to CalSTRS. Was this overpayment received by the guardianship estate? 3. Need proposed order on petition. Local Rule 7.1.1.F. 4. Need separate Order(s) to Deposit Money into Blocked Account (MC-355) as applicable. <p>Note: Per Minute Order 9-8-14, a status hearing for the filing of the I&A is set for 1-12-15.</p> <p>Note: If this petition is granted, the Court will also set a status hearing for the filing of the increased bond and receipts for blocked account(s).</p>
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	Pers.Serv.		<p>CalSTRS has also provided Ms. Alvarez with notice that \$9,561.73 is due to CalSTRS for benefit payments made to the mother after her death.</p> <p>Petitioner anticipates using the monthly \$1,500.00 benefit from CalSTRS for the minor's monthly support, maintenance, and education. She does not anticipate needing access to the \$6,163.00 one-time death benefit, the \$10,533.90 Defined Benefit Supplement, or the \$25,000.00 Texas Life insurance benefit for the comfortable and suitable support, maintenance, or education of the minor.</p> <p>The Letters of Guardianship require a specific Court order before Petitioner can take possession of the additional assets. Petitioner requests that the Court authorize her to take control of the \$6,163.00 one-time death benefit and the \$10,533.90 Defined Benefit Supplement and the \$25,000.00 Texas Life Insurance benefit and deposit these funds into a blocked account for the minor.</p> <p>Petitioner further requests that bond be increased by \$18,000.00, representing the \$1,500.00 monthly benefit, for a total bond of \$25,629.30.</p> <p style="text-align: center;"><u>SEE PAGE 2</u></p>
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	Status Rpt		Reviewed by: skc Reviewed on: 12-19-14 Updates: Recommendation: File 5 - Alvarez
	UCCJEA		
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	FTB Notice		

Petitioner requests the Court issue Orders:

1. Creating a blocked account for the benefit of the minor;
2. Instructing Petitioner to take control of the assets as set forth above and deposit said funds, less the \$9,561.73 owed to CalSTRS, into the blocked account;
3. Instructing Petitioner to take possession of the monthly \$1,500.00 CalSTRS benefit to provide for the comfortable and suitable support, maintenance, and education of the minor and requiring that bond be increased by \$18,000.00, for total bond of \$25,629.30; and
4. For any and all other relief the Court deems just and proper.

Probate Status Hearing Re: Filing Inventory & Appraisal

DOD: 04/20/2014	MARGARET NICHOLS , spouse, was appointed Administrator with full IAEA authority without bond on 09/02/2014.	NEEDS/PROBLEMS/COMMENTS: 1. Need Final Inventory and Appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
	Letters issued on 09/03/2014.	
	Partial No. 1 Inventory and Appraisal filed 10/22/2014 shows an estate valued at \$275,000.00.	
Cont. from	Minute Order of 09/02/2014 set this status hearing for the filing of the Inventory and Appraisal.	
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		Reviewed by: LV
		Reviewed on: 12/18/2014
		Updates:
		Recommendation:
		File 6 - Nichols

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 10/16/2013		JANET DIANE KRAMER, daughter/named Executor without bond, is petitioner. Full IAEA – o.k. Will dated: 02/24/1989 Residence: Fresno Publication: The Business Journal <u>Estimated Value of the Estate:</u> Real property - \$210,000.00 Probate Referee: Rick Smith	NEEDS/PROBLEMS/COMMENTS: <u>Note: If the petition is granted status hearings will be set as follows:</u> • Tuesday, 05/05/2015 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Tuesday, 03/01/2016 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.	
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Reviewed by: LV Reviewed on: 12/18/2014 Updates: Recommendation: Submitted File 7 - Ragsdale				

Israel DOD: 12/15/12	GIDALHI V. PANDO, trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
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GIDALHI V. PANDO, trustee, is Petitioner.

Petitioner states:

1. **ISRAEL HERNANDEZ** and **MARIA ELISA HERNANDEZ**, were married on 08/31/39, neither owned any separate property interests at the time they were married and all assets owned by them were acquired during their marriage and were community property.
2. On 01/24/96, ISRAEL HERNANDEZ and MARIA ELISA HERNANDEZ established the **HERNANDEZ FAMILY TRUST** (the "Trust"). Israel and Maria were the initial trustees of the Trust.
3. On 11/12/12, Israel and Maria signed a Restatement of the Trust wherein Gidalhi V. Pando was added as a co-trustee along with Israel and Maria.
4. Israel died on 12/15/12. Maria is alive and lives with her daughter Ada Flores in San Mateo. In light of the health of Maria, she resigned as co-trustee on 02/02/13 and Gidalhi Pando has served as the sole trustee since then.
5. Article I of the Restatement indicates that all of the property described in Exhibit A shall constitute the "Trust Estate". Exhibit A lists the following property: A. Residence located at 590 W. Alluvial in Clovis, B. Miscellaneous Accounts at Bank of America, C. Miscellaneous Personal Property Items.
6. Israel died 33 days after the restatement was signed. Title to the real property at 590 W. Alluvial, Clovis did not transfer to the Trust as of the date of Israel's death. Title to the property was held in joint tenancy.

Continued on Page 2

Reviewed by: JF

Reviewed on: 12/19/14

Updates: 12/29/14

Recommendation:

File 8 - Hernandez

7. Titles to the Bank of America accounts were also not transferred to the Trust. From the 04/15/14 statement, title to the Bank of America accounts appear to be held in joint tenancy between Israel and Maria, however, in July 2014, Petitioner checked with Bank of America when one co the CD's was maturing and according to the bank titles to 4 CD's are held in Israel's name only rather than in joint tenancy with Maria. The 4 CD's value totals \$176,808.57.
8. With their reference in Exhibit A attached to the Restatement of the Trust signed 11/12/12, Israel and Maria intended all of the Bank of America accounts to be assets of the Trust. A written Declaration of Trust, by itself, is sufficient to create a Trust in the 4 Bank of America Certificate of Deposit accounts. In order to allow these accounts to be administered in the Trust without the expense and delay of the probate in the Estate of Israel Hernandez, Petitioner requests an Order confirming that the 4 Bank of America C.D. accounts belong to the Trust.
9. Israel Hernandez also executed a "pour-over" will on 01/24/96 that provides that all assets will pass to the Trust.

Petitioner prays for an Order:

1. Confirming and determining that Israel Hernandez's 100% interest in Bank of America C.D. Accounts Nos. ending in 0275, 8872, 0143 and 0414 is community property and is owned by Gidalthi V. Pando, Trustee of the Hernandez Family Trust dated 1/24/96.

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		<u>OFF CALENDAR.</u> <u>DISMISSAL ENTERED ON</u> <u>12/15/2014.</u>
		Reviewed by: LV
		Reviewed on: 12/19/2014
		Updates:
		Recommendation:
		File 9 - Helsel

Petition for Probate of Will and for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 08/30/2014		<p>KAREN WARD, sister is petitioner and requests appointment as Administrator without bond.</p> <p>All heirs nominate petitioner and waive bond.</p> <p>Full IAEA – o.k.</p> <p>Decedent died intestate</p> <p>Residence: Reedley Publication: The Reedley Exponent</p> <p>Estimated value of the Estate:</p> <table> <tr> <td>Personal property</td> <td>-</td> <td>\$101,000.00</td> </tr> <tr> <td>Real Property</td> <td>-</td> <td>\$100,000.00</td> </tr> <tr> <td>Total</td> <td>-</td> <td>\$201,000.00</td> </tr> </table> <p>Probate Referee: Steven Diebert</p>	Personal property	-	\$101,000.00	Real Property	-	\$100,000.00	Total	-	\$201,000.00	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Tuesday, 05/05/2015 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Tuesday, 03/01/2016 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
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Real Property	-		\$100,000.00									
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<input checked="" type="checkbox"/>	Duties/Supp											
<input type="checkbox"/>	Objections											
<input type="checkbox"/>	Video Receipt											
<input type="checkbox"/>	CI Report											
<input type="checkbox"/>	9202											
<input checked="" type="checkbox"/>	Order											
<input type="checkbox"/>	Aff. Posting											
<input type="checkbox"/>	Status Rpt											
<input type="checkbox"/>	UCCJEA											
<input type="checkbox"/>	Citation											
<input type="checkbox"/>	FTB Notice											

Petition for Probate of Lost Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 11/12/11		<p>JOSEPH TONY RIZOS, son/named executor without bond, is Petitioner.</p> <p>Full IAEA – OK</p> <p>Will dated 05/20/92 – <i>Petitioner states that the original will has been lost. The decedent believed that the attached copy of the will was the original, referred to it as her will and always kept the document in her safe. Moreover, it was the only document regarding her testamentary intent that she had in her possession during her lifetime and at the time of her death. After the decedent's death, Petitioner retrieved the attached document from the decedent's safe. Petitioner tried to locate the attorney who drafted the will to see if they had the original, however he was unsuccessful in that regard. Petitioner requests that the will be admitted to probate.</i></p> <p>Residence: Fresno Publication: The Business Journal</p> <p><u>Estimated Value of the Estate:</u> Unknown</p> <p>Probate referee: STEVEN DIEBERT</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> Need Order and Letters. Note: Need Order pursuant to Probate Code §8223: "If the will is proved, the provisions of the will shall be set forth in the order admitting the will to probate." Need date of death of predeceased spouse pursuant to Local Rule 7.1.1D which states: If a beneficiary, heir, child, spouse, or registered domestic partner in any action before the Probate Court is deceased, that person's date of death shall be included in the petition. <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> Tuesday, 05/05/2015 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and Tuesday, 03/01/2016 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.	s/p		
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail	w/		
<input checked="" type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters	x		
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input type="checkbox"/> Order	x		
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			

12 **Nora Ramirez Medina (Estate)**

Atty Kennedy, Bruce Francis

Case No. 03CEPR01301

Status Hearing Re: Final Closing Statement

Age:		NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> Final Closing Statement filed 12/01/14 and Order on Petition for Termination filed 12/08/14
DOD:		
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input type="checkbox"/>	Notice of Hrg	
<input type="checkbox"/>	Aff.Mail	
<input type="checkbox"/>	Aff.Pub.	
<input type="checkbox"/>	Sp.Ntc.	
<input type="checkbox"/>	Pers.Serv.	
<input type="checkbox"/>	Conf. Screen	
<input type="checkbox"/>	Letters	
<input type="checkbox"/>	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input type="checkbox"/>	CI Report	
<input type="checkbox"/>	9202	
<input type="checkbox"/>	Order	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
		Reviewed by: JF
		Reviewed on: 12/19/14
		Updates:
		Recommendation:
		File 12 - Medina

12

13 Caitlin Lanier and Autumn Lanier (GUARD/P)
 Atty Lanier, Brandi
 Atty Lanier, Kenneth

Case No. 10CEPR00510

Status Hearing Re: Filing of the Proof of Establishing a Guardianship in Missouri

		BRANDI CHAVONNE LANIER , guardian, filed an ex parte Petition to Fix Residence Outside the State of California on 3-6-14. The Court set the matter for hearing on 3-19-14. At the hearing on 3-19-14, the Court granted the petition and set this status hearing for the filing of proof of guardianship in Missouri. Status Report filed 7-9-14 states the family move to Springfield, Missouri on 3-22-14. Since moving, Caitlin and Autumn have been doing well and are in communication with their parents. On 6-23-14, Mrs. Lanier met with an attorney from Legal Services of Southern Missouri, who told her that guardianship could not be established in Missouri until they had resided there for six months pursuant to the Uniform Child Custody Jurisdiction and Enforcement Act. Mrs. Lanier intends to contact the attorney in October to establish guardianship. Mrs. Lanier therefore requests that the Court postpone the status hearing until after November 15, 2014, and that the California Guardianship remain in full force and effect until guardianship in Missouri can be established.	NEEDS/PROBLEMS/COMMENTS: Minute Order 11-18-14: A written status report is to be filed by 12/31/14. Brandi Lanier is ordered to be present via Court Call on 01/06/15. Cont. to 010615. 1. Need proof of establishment of guardianship or equivalent in Missouri pursuant to Probate Code §2352(d) or verified written status report pursuant to Local Rule 7.5 and the Court Minute Order 11-18-14.
Cont. from 071814, 111814			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.		Reviewed by: skc Reviewed on: 12-19-14 Updates: Recommendation: File 13 – Lanier	
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202 Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

	On 06/03/13 JAMIE STARR HAMILTON THOMAS , beneficiary, filed a Verified Petition for (1) Removal of Trustee; (2) Accounting; (3) Surcharge; and (4) Approval of Attorney Fees. The matter was continued numerous times and a settlement conference was set for 05/12/14.	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 12/02/14</u> Minute Order from 12/02/14 states: A third draft of an agreement was submitted to Mr. Pimentel this morning by Mr. Milnes. Both attorneys represent that their clients will now sign. If the agreement is filed by 01/02/15, then no appearance is necessary on 1/06/15.
Cont. from 120214		
Aff.Sub.Wit.	On 04/14/14, JAMIE STARR HAMILTON THOMAS , filed an Ex Parte Petition to Remove Gary Hamilton as Trustee and Appoint Interim Trustee Pending Final Hearing. The matter was set for hearing. Minute Order from 04/29/14 vacated the Settlement Conference set for 05/12/14 and Evidentiary hearing that was set for 06/16/14. The matter was continued and status hearings were held. On 08/21/14 the Ex Parte Petition was dismissed.	1. Need status update regarding settlement agreement. As of 12/18/14, nothing further has been filed in this matter.
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.	On 10/28/14, a Settlement Conference was held. Minute Order from hearing on 10/28/14 set this matter for a status hearing and states: Also present in court is Allen Thomas. Parties engage in settlement discussions with the Court. Matter resolved. Parties agree that Gary Hamilton will resign as trustee and Bruce Bickel will be appointed as successor trustee. Parties further agree that Bruce Bickel will review the accounting prepared by the prior trustee. Bruce Bickel will be authorized to make any recommendations regarding prior actions of the trustee. Jamie Thomas will be bound by the acts of the successor trustee as set forth by the Court and Mr. Milnes will withdraw his petition. Further terms and conditions of the agreement are as set forth by the Court. Upon inquiry by the Court, each party individually agrees to the terms and conditions of the settlement. Mr. Milnes is directed to prepare the agreement by no later than 11/12/14. Mr. Pimentel will have two weeks thereafter to review and execute said agreement.	
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 12/18/14
		Updates:
		Recommendation:
		File 14 – Hamilton

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 02/10/2014	MICHAEL FREELY , cousin was appointed Executor with full IAEA with bond set at \$400,000.00.	NEEDS/PROBLEMS/COMMENTS: 1. Need Inventory and Appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
	Receipt of Bond in the amount of \$400,000.00 was filed on 09/04/2014.	
	Letters issued on 09/10/2014.	
Cont. from	Minute Order of 08/05/2014 set this Status Hearing for the filing of the Inventory and Appraisal.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 12/18/2014
		Updates:
		Recommendation:
		File 15 - Pelletier

16A Gabriel Carrillo, Valerie Perez, Daniel Perez, Ebony Perez (GUARD/P)**Case No. 08CEPR00913****Atty Rodriguez, Maria Eloisa (pro per – paternal aunt/Petitioner)****Petition for Appointment of Guardian of the Person (Prob. C. 1510)**

Valerie, age 13	<u>TEMPORARY EXPIRES 01/06/15</u>	NEEDS/PROBLEMS/COMMENTS:
Daniel, age 10	MARIA ELOISA RODRIGUEZ , Paternal Aunt, is Petitioner.	<u>CONTINUED FROM 11/18/14</u>
Ebony, age 5	Father: ANGEL PEREZ - Personally served 9-17-14; Consents and waiver of notice filed 11/10/14	Minute Order from 11/18/14 states: Angel Perez, father, states he does not know if his father is alive or his possible whereabouts, and Enedina Carrillo, mother, states her father is Nick Carrillo and his whereabouts are unknown. The Court dispenses with notice as to both unless or until their whereabouts become known. The Court orders any objections must be filed by 12/31/14. Furthermore, the children may be picked up by Petitioner today at 4pm from Nora Carrillo's home, along with clothes and personal items that the minors wish to take. Temporary letters are to issue to Maria Eloisa Rodriguez forthwith.
Cont. from 111814	Mother: ENEDINA CARRILLO - Personally served 9-17-14; Consent & Waiver of Notice filed 11/10/14	Note: This petition is for minors Valerie, Daniel, and Ebony only. Maternal Uncle Nicholas Carrillo, Jr., was appointed Guardian of the minor Gabriel Carrillo on 11-6-13.
<input type="checkbox"/> Aff.Sub.Wit.	Paternal Grandfather: UNKNOWN – Court dispensed with notice on 11/18/14	Note: Petitioner resides in Tulare, CA. The children have been residing in Fresno County with their maternal grandmother and mother.
<input checked="" type="checkbox"/> Verified	Paternal Grandmother: SARA LOY - Consents and waives notice	
<input type="checkbox"/> Inventory	Maternal Grandfather: UNKNOWN – Court dispensed with notice on 11/18/14	
<input type="checkbox"/> PTC	Maternal Grandmother: NORA CARRILLO - Personally served 9-17-14	
<input type="checkbox"/> Not.Cred.	Minor Valerie Perez was personally served 9-17-14; Consents and waives notice	
<input checked="" type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input checked="" type="checkbox"/> Pers.Serv.		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
	Petitioner states the parents are not stable. Valerie and Daniel stay with their grandmother Nora. The mother leaves for days at a time with Ebony. The father is aware that the mother is living at another address with just her and Ebony. The mother may have a substance abuse problem. The children are left alone at times without supervision. The father is unable to care for the children at this time due to his living arrangement. The father has asked Petitioner to act as guardian while the parents get situated.	
	Court Investigator Dina Calvillo filed a report on 11/10/14.	
		Reviewed by: JF
		Reviewed on: 12/18/14
		Updates:
		Recommendation:
		File 16A – Carillo/Perez

16A

Second Amended Account and Report of Conservator of Estate, Petition for Approval

		CHARLOTTE A. YOUNG, Conservator without bond, is Petitioner. Account period: 5-12-13 through 6-30-14 Accounting: \$ 23,376.81 Beginning POH: \$ 2.14 Ending POH: \$ 748.32 Conservator: \$750.00 (\$50/month) Petitioner requests an order: 1. For settlement and allowance of this account and report and approval and confirmation of the acts of petitioner as conservator; 2. For \$750 as compensation to the conservator for her services to the Conservatee during the period of this account; 3. For such other orders as the Court deems proper.	NEEDS/PROBLEMS/COMMENTS: 1. Need Notice of Hearing. 2. Need proof of service of Notice of Hearing at least 15 days prior to the hearing per Probate Code §§ 1460, 1461.5 on: - Acie Lee Hopkins (Conservatee) - Office of Veterans Administration 3. There are numerous bank and ATM charges. The Court may require clarification. 4. Need order.	
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			<input checked="" type="checkbox"/>
<input type="checkbox"/>	Aff.Mail			<input checked="" type="checkbox"/>
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	2620(c)			
<input type="checkbox"/>	Order	<input checked="" type="checkbox"/>		
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
Reviewed by: skc				
Reviewed on: 12-19-14				
Updates:				
Recommendation:				
File 17 - Hopkins				

DOD: 2-2-01		BARBARA MORRIS , Surviving Spouse, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. The petition is blank at #5.b. Was the decedent survived by issue of a predeceased child? 2. The petition is blank at #6. Was the decedent survived by parents or siblings? 3. Petitioner checked Box 1a indicating that she is requesting determination of property passing to her; however, the petition is blank at #7a and does not contain Attachment 7a (legal description). 4. The petition is blank at #8. Does a written agreement exist? 5. Petitioner states at #12 that a petition for probate is being filed with this petition. Need clarification. The Court may consolidate this case with the probate, if any. 6. The marriage certificate attached is not an official marriage license issued by the County of Fresno. Were Petitioner and the decedent legally married? 7. The attached grant deed indicates joint tenancy, which means that the property may pass pursuant to real property laws and Court order may not be required for the property to pass to Petitioner. However, the copy provided is incomplete and does not show the legal description, so Examiner is unable to confirm if this is the same property as requested to pass. 8. The petition was filed with a fee waiver. If property is determined to pass to Petitioner, the filing fee for this petition \$435 is due. 9. Need order, complete with legal description. Local Rule 7.1.1.F. Reviewed by: skc Reviewed on: 12-19-14 Updates: Recommendation: File
		Decedent died intestate	
		Petitioner states she is the only surviving relative of the decedent. She and the decedent were married 8-21-99 in Fresno County. Mr. Morris' helath began to decline in late 2000 from ALS, which lead to his death on 2-2-01. Mr. Morris purchased the home at 20868 Troutdale Ln in Riverdale, CA, in approx. July 1999 while they prepared for wedding. See attached Grant Deed. During their short time, Mr. and Mrs. Morris spent much time dealing with Carl's illness and neglected to address constructing a living will. Mrs. Morris lost sight of the financial situation due to being grief stricken, and was not prepared emotionally or financially for Carl's passing. Since his passing, Mrs. Morris has continued to keep up the payments and the upkeep of the property and she is asking the Court to grant her the property as Carl's surviving spouse.	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	x	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order	x	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		Attachments include the decedent's birth and death certificates, marriage certificate, a mortgage statement indicating the decedent's name only, and a Grant Deed recorded 7-20-99 in which Carl E. Morris, an unmarried man, and Barbara Mc Ausland, an unmarried woman, grant to themselves, Carl E. Morris, an unmarried man, and Barbara Mc Ausland, an unmarried woman, as joint tenants, property as attached; however, the attachment to the Grant Deed is not provided.	
		Petitioner requests Court determination that the property passes to her.	

19 **Anabel R. Fernandez (CONS/P)**
 Atty Verbera, Maria T. (Pro Per – Mother – Petitioner)
 Atty Bagdasarian, Gary (Court appointed for Proposed Conservatee)

Case No. 14CEPR00841

Petition for Appointment of Probate Conservator of the Person
 (Prob. C. 1820, 1821, 2680-2682)

		<p>MARIA T. VERBERA, Mother, is Petitioner and requests appointment as Probate Conservator of the Person with medical consent powers under Probate Code §2355.</p> <p>Petitioner states the proposed Conservatee suffers from methamphetamine abuse and displays schizophrenic like behaviors. She is a danger to herself and has on more than one occasion attempted to remove herself from a moving vehicle. Petitioner states the proposed Conservatee suffered a head injury in October 2013 and since then has consistently refused to seek medical care. Petitioner believes she has a phobia of doctors and provides examples.</p> <p>Court Investigator Jennifer Daniel filed a report on 12-18-14.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 10-20-14: The Court orders that counsel be appointed to represent Anabel Fernandez. The court investigator is ordered to go forward with the investigation.</p> <p>Note: Attorney Gary Bagdasarian was appointed to represent the Conservatee on 12-11-14.</p> <ol style="list-style-type: none"> 1. Need rights advised. 2. Need capacity declaration in support of request for medical consent powers. 	
Cont from 102014				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			W
	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
✓	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
			Reviewed by: skc Reviewed on: 12-19-14 Updates: Recommendation: File 19 – Fernandez	

Pro Per Voelker, Pamela Walker (Pro Per Petitioner, daughter)

Petition to Determine Succession to Real Property (Prob. C. 13151)

DOD: 5/30/2013	PAMELA WALKER VOELKER, daughter, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: <u>Continued from 10/21/2014.</u> Minute Order states examiner notes are provided to the Petitioner. The following issues from the last hearing remain: 1. <i>Petition</i> was filed with a fee waiver. Filing fees are due prior to distribution of property from an estate. Therefore, filing fee of \$435.00 is due prior to the order for distribution being processed for Petitioner. 2. Item 8 of the <i>Petition</i> requires a <i>Final Inventory and Appraisal</i> to be attached to the <i>Petition</i> . Need <i>Final Inventory and Appraisal</i> (Judicial Council form DE-160, 161) completed by a probate referee pursuant to Probate Code § 13152(b). 3. Item 9 of petition states Decedent's spouse is deceased. Item 14 of <i>Petition</i> does not include the name and date of death of deceased spouse pursuant to Local Rule 7.1.1 (D). 4. Item 10 of the <i>Petition</i> states Decedent is survived by a brother, sister or issue of a deceased brother or sister of the Decedent; however, that person's name and residence address are not listed in Item 14 of the <i>Petition</i> as required. (Note: Petitioner attached a copy of the death certificate of GARLAND MARK WALKER , son of Decedent (DOD 7/22/2011).) 5. Exhibit A attached to the <i>Petition</i> containing the legal description of the property does not state the amount (percentage) of Decedent's interest in the property.
	40 days since DOD.	
Cont. from 102114	No other proceedings.	
<input type="checkbox"/> Aff.Sub.Wit.		
✓ Verified		
Inventory		
PTC	I & A - Need	
Not.Cred.		
Notice of Hrg	X	
Aff.Mail	X	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LEG
		Reviewed on: 12/22/14
		Updates:
		Recommendation:
		File 20 - Walker

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 7		<u>TEMPORARY EXPIRES 01/06/2015</u>		NEEDS/PROBLEMS/COMMENTS: 1. Need Notice of Hearing. 2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Paternal Grandfather (Unknown)
		TINE SHOLES , maternal aunt, is Petitioner. Father: JAMES MICHAEL MURRAY ; <i>Court finds due diligence as to father per minute order of 11/04/2014;</i> Mother: RAMONA QUINONES ; <i>consents and waives notice.</i> Paternal grandfather: Unknown Paternal grandmother: Debbie Murray; <i>Deceased.</i> Maternal grandfather: Crispin Quinones; <i>consents and waives notice.</i> Maternal grandmother: Christine Quinones; <i>consents and waives notice.</i>		
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
✓	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg	X		
<input type="checkbox"/>	Aff.Mail	X		
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.	n/a		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
✓	CI Report			
<input type="checkbox"/>	9202			
✓	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
✓	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
Court Investigator Dina Calvillo's report filed 12/17/2014.				Reviewed by: LV Reviewed on: 12/19/2014 Updates: Recommendation: File 21 - Murray

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 2 months		<p align="center">There is no Temporary</p> <p>WILLIE MAE JOHNSON, maternal aunt, is petitioner.</p> <p>Father: RICHARD CAMPBELL, SR. – <i>consents and waives notice.</i></p> <p>Mother: JAHADRAH JOHNSON – <i>consents and waives notice.</i></p> <p>Paternal grandfather: Narvel Boston Paternal grandmother: Selestine Campbell Maternal grandfather: Lodie Caldwell Maternal grandmother: Rosalind Caldwell</p> <p>Petitioner states she would like placement of the child as a safety plan in lieu of foster care until Jahadrah and Richard are found capable of caring for baby Richard.</p> <p>Court Investigator Samantha Henson's Report filed on 12/19/14..</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service of the Notice of Hearing or Consent and Waiver of Notice or Declaration of Due Diligence on: <ol style="list-style-type: none"> a. Narvel Boston (paternal grandfather) b. Selestine Campbell (paternal grandmother) c. Lodie Caldwell (maternal grandfather) d. Rosalind Caldwell (maternal grandmother) 				
Cont. from							
<input type="checkbox"/> Aff.Sub.Wit.							
<input checked="" type="checkbox"/> Verified							
<input type="checkbox"/> Inventory							
<input type="checkbox"/> PTC							
<input type="checkbox"/> Not.Cred.							
<input type="checkbox"/> Notice of Hrg <input checked="" type="checkbox"/>							
<input type="checkbox"/> Aff.Mail <input checked="" type="checkbox"/>							
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<input type="checkbox"/> Pers.Serv.							
<input checked="" type="checkbox"/> Conf. Screen							
<input checked="" type="checkbox"/> Letters							
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<input checked="" type="checkbox"/> Order							
<input type="checkbox"/> Aff. Posting							
<input type="checkbox"/> Status Rpt							
<input checked="" type="checkbox"/> UCCJEA							
<input type="checkbox"/> Citation							
<input type="checkbox"/> FTB Notice							
		<table border="1"> <tr><td>Reviewed by: KT</td></tr> <tr><td>Reviewed on: 12/18/14</td></tr> <tr><td>Updates:</td></tr> <tr><td>Recommendation:</td></tr> <tr><td>File 22 – Campbell</td></tr> </table>	Reviewed by: KT	Reviewed on: 12/18/14	Updates:	Recommendation:	File 22 – Campbell
Reviewed by: KT							
Reviewed on: 12/18/14							
Updates:							
Recommendation:							
File 22 – Campbell							

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

Age: 2 DOB: 05/25/2012		<u>GENERAL HEARING 02/19/2015</u>		NEEDS/PROBLEMS/COMMENTS:	
		KELLIE ANN YOUNG , maternal grandmother, is petitioner.		1. Need Notice of Hearing.	
		Father: CURTIS LEE HENDERSON , Declaration of Due Diligence filed 12/12/2014		2. Need proof of personal service five (5) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Temporary Guardian or consent and waiver of notice or declaration of due diligence for:	
Cont. from		Mother: SHYAWN AVALDA WILLIAMS		• Curtis Lee Henderson (Father) – Unless the Court dispenses with notice.	
	Aff.Sub.Wit.			Note: Declaration of Due Diligence filed 12/12/2014 states petitioner could not find the father on any of the search engines listed.	
✓	Verified			• Shyawn Avallda Williams (Mother)	
	Inventory				
	PTC				
	Not.Cred.				
	Notice of Hrg		x		
	Aff.Mail		x		
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.				
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				
				Reviewed by: LV	
				Reviewed on: 12/19/2014	
				Updates:	
				Recommendation:	
				File 23 – Henderson	

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

Age: 17		<u>TEMPORARY EXPIRES 01/06/2015</u>		NEEDS/PROBLEMS/COMMENTS:
		<u>GENERAL HEARING 02/19/2015</u>		1. Need Notice of Hearing.
Cont. from		ERWIN AVALOS LOPEZ , minor, is petitioner and requests that RONALD AVALOS LOPEZ , brother, be appointed the guardian of his person.		2. Need proof of personal service fiive (5) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Temporary Guardian or consent and waiver of notice or declaration of due diligence for:
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified	Father: ROLANDO AVALOS RODRIGUEZ		<ul style="list-style-type: none"> • Rolando Avalos Rodriguez (Father) • Blanca Estela Lopez Lopez (Mother)
<input type="checkbox"/>	Inventory	Mother: BLANCA ESTELA LOPEZ LOPEZ		
<input type="checkbox"/>	PTC	Paternal Grandfather: Bernabe Avalos		3. Need Memorandum of Points and Authorities regarding Special Immigration Juvenile Status.
<input type="checkbox"/>	Not.Cred.	Paternal Grandmother: Modesta Jacinto		
<input type="checkbox"/>	Notice of Hrg	<input checked="" type="checkbox"/>	Maternal Grandfather: Pablo Avila Lopez	
<input type="checkbox"/>	Aff.Mail	<input type="checkbox"/>	Maternal Grandmother: Izabel Lopez Santos	
<input type="checkbox"/>	Aff.Pub.	<input type="checkbox"/>		
<input type="checkbox"/>	Sp.Ntc.	<input type="checkbox"/>		
<input type="checkbox"/>	Pers.Serv.	<input checked="" type="checkbox"/>	Petitioner states: guardianship of the minor is necessary because he has been neglected by bot of his parents. Guardianship by his brother, Ronald Avalos Lopez, is necessary and in the best interest of the minor to provide him with a safe and stable living environment. Furthermore, reunification with one or both parents would be detrimental to the minor and the child needs to have guardian appointed to qualify for Special Immigration Juvenile Status.	
<input checked="" type="checkbox"/>	Conf. Screen	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	Letters	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	Duties/Supp	<input type="checkbox"/>		
<input type="checkbox"/>	Objections	<input type="checkbox"/>		
<input type="checkbox"/>	Video Receipt	<input type="checkbox"/>		
<input type="checkbox"/>	CI Report	<input type="checkbox"/>		
<input type="checkbox"/>	9202	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	Order	<input type="checkbox"/>	Declaration of Proposed Guardian, Ronald Avalos Lopez, filed 12/16/2014 states guardianship is necessary to provide him with a safe, stable living environment. The minor has resided with proposed guardian for over four months. Parental custody would be detrimental because the parents live in Guatemala because the parents were unable to provide him with an appropriate home. In addition, the minor's father was physically abusive towards the minor. The minor was often unsafe and at risk of harm when he was in his care. Proposed guardian state the parent's consent to the guardianship.	
<input type="checkbox"/>	Aff. Posting	<input type="checkbox"/>		
<input type="checkbox"/>	Status Rpt	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	UCCJEA	<input type="checkbox"/>		
<input type="checkbox"/>	Citation	<input type="checkbox"/>		
<input type="checkbox"/>	FTB Notice	<input type="checkbox"/>		
<u>Please see additional page</u>				Reviewed by: LV
				Reviewed on: 12/19/2014
				Updates:
				Recommendation:
				File 24 - Lopez

Declaration of Petitioner filed 12/16/2014 states guardianship is necessary because both of petitioner's parents reside in Guatemala. Petitioner, minor, fled from Guatemala on 06/25/2014. He had been neglected by both parents. Petitioner's parents were unable to provide for the minor/petitioner. Father, was physically abusive toward the minor and as a result petitioner/minor immigrated to the United States. Petitioner/minor has been residing with his brother, Ronald Avalos Lopez, since August 2014. Guardianship is necessary to provide for a safe, stable living environment. Petitioner states that his parent's consent to the guardianship.

Petition for Appointment of Temporary Guardian of the Person

Age: 1		GENERAL HEARING 02/19/2015		NEEDS/PROBLEMS/COMMENTS:	
		JACLYN ASHLEY MIRAMONTES-STAGGS		1. Need Notice of Hearing.	
		and MONTE STAGGS , maternal aunt		2. Need proof of personal service	
		and uncle, are petitioners.		five (5) days prior to the hearing	
Cont. from		Father: TYLEE AUSTIN		of the Notice of Hearing along	
	Aff.Sub.Wit.	Mother: CARRIE ANN LOPEZ AUSTIN		with a copy of the Petition for	
✓	Verified	Paternal Grandparents: Unknown		Appointment of Temporary	
	Inventory	Maternal Grandfather: Unknown		Guardian or consent and waiver	
	PTC	Maternal Grandmother: Ginger Ann		of notice or declaration of due	
	Not.Cred.	Miramontes		diligence for:	
	Notice of Hrg	Petitioner states: that the child was left		<ul style="list-style-type: none"> • Tylee Austin (Father) • Carrie Ann Lopez Austin (Mother) 	
	Aff.Mail	in her care since 11/02/2014 when the			
	Aff.Pub.	mother was to go grocery shopping			
	Sp.Ntc.	and never returned. Mother checked			
	Pers.Serv.	into West Care. Petitioner states that			
✓	Conf. Screen	the mother has already lost two of her			
✓	Letters	children as they were adopted out			
✓	Duties/Supp	because of her drug addiction and for			
	Objections	her unsuitable living conditions.			
	Video Receipt	Petitioner is requesting temporary			
	CI Report	guardianship in order to obtain medical			
	9202	care for the child.			
✓	Order			Reviewed by: LV	
	Aff. Posting			Reviewed on: 12/19/2014	
	Status Rpt			Updates:	
✓	UCCJEA			Recommendation:	
	Citation			File 25 - Austin	
	FTB Notice				

			GENERAL HEARING 2-23-15	NEEDS/PROBLEMS/COMMENTS:
			TEODOMIGIA TRINIDAD , Paternal Grandmother, is Petitioner.	1. Need Notice of Hearing. 2. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) or consent and waiver of notice or declaration of due diligence on: - Federico Trinidad (Father) - Yolanda Jacuinde (Mother)
			Father: FEDERICO TRINIDAD	
			Mother: YOLANDA JACUINDE	
			Paternal Grandfather: Lorenzo Aparicio	
			Maternal Grandfather: Eduardo Jacuinde	
			Maternal Grandmother: Yolanda Moreno (Deceased)	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg	x		
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.	x		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report		<p>Petitioner states the mother is not able to care for the children due to her drug use. Nicholai is slow in speech. Petitioner needs temporary guardianship to take him to a therapist or seek medical help.</p> <p>Attached is a DSS Team Decision-Making Summary Report dated 12-4-14 pursuant to which Nicholai and Trinity were placed with their paternal grandmother, Petitioner Teodomigia Trinidad, and their three older siblings were placed with their paternal grandmother, Lupita Chavez. The TDM is signed by DSS, Petitioner, the mother, and other parties.</p> <p>Petitioner states the father is incarcerated and she may not be able to serve him in time for the hearing.</p>	
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
				Reviewed by: skc
				Reviewed on: 12-23-14
				Updates:
				Recommendation:
				File 26 - Fernandez & Trinidad